12/9/2019: Email sent to all Cardinal Fiscal Officers and Cardinal Financial users (excluding VDOT).
Subject: Cardinal Upgrade Impacts for Statewide Users

In this communication you will find details regarding the most impactful changes Cardinal Financials users will see after the deployment of technical upgrades on **Tuesday, December 10, 2019**. Outlined below are specific changes, a screenshot of the change where appropriate, and the corresponding updated course materials and job aids.

General Impacts
- Navigation has been simplified when running reports. A brief summary is below:
  - New **Report Manager** link displays on the **Process Monitor – Process List** page when a report is run in Cardinal. This link provides easy access to the **Report Manager** page without the additional navigation.
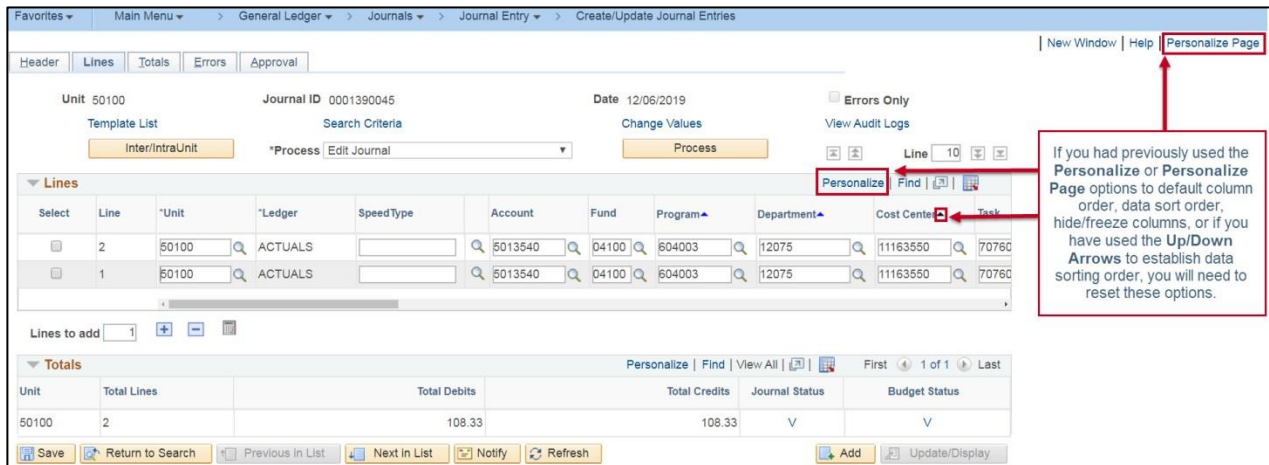

- New **Return** button is available on the **Report Details** page, which brings the user back to the **Report Manager** listings.
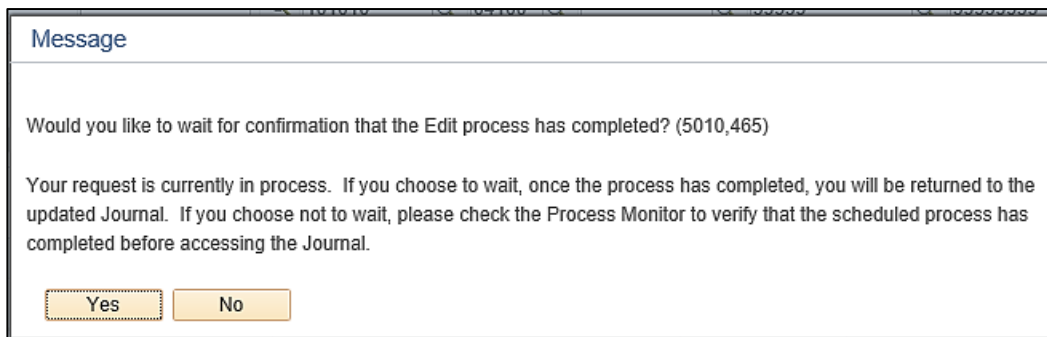

Updated Course: [NAV220: Cardinal Reporting](#) (Pages 19; 43)

- **Grid Personalization**: After the upgrade, any user-created grid personalization (used to set field order or sorting order on a page) will revert back to the Cardinal default and will need to be reapplied if desired.

General Ledger (GL)

- New pop-up message displays when editing or posting a manual journal entry from the **Journal Lines** tab, which requires a response.

- o You must select either **Yes** or **No** to start the Edit process. If you click:
    - **Yes:** The journal edit process will start and you would remain on the **Journal Lines** tab
    - **No:** The journal edit process will start, you will receive the process instance, and you will be redirected to the **Create/Update Journal Entries** inquiry page

  Note: If you leave the page without selecting either the Yes or the No button, the journal edit process **will not run**.
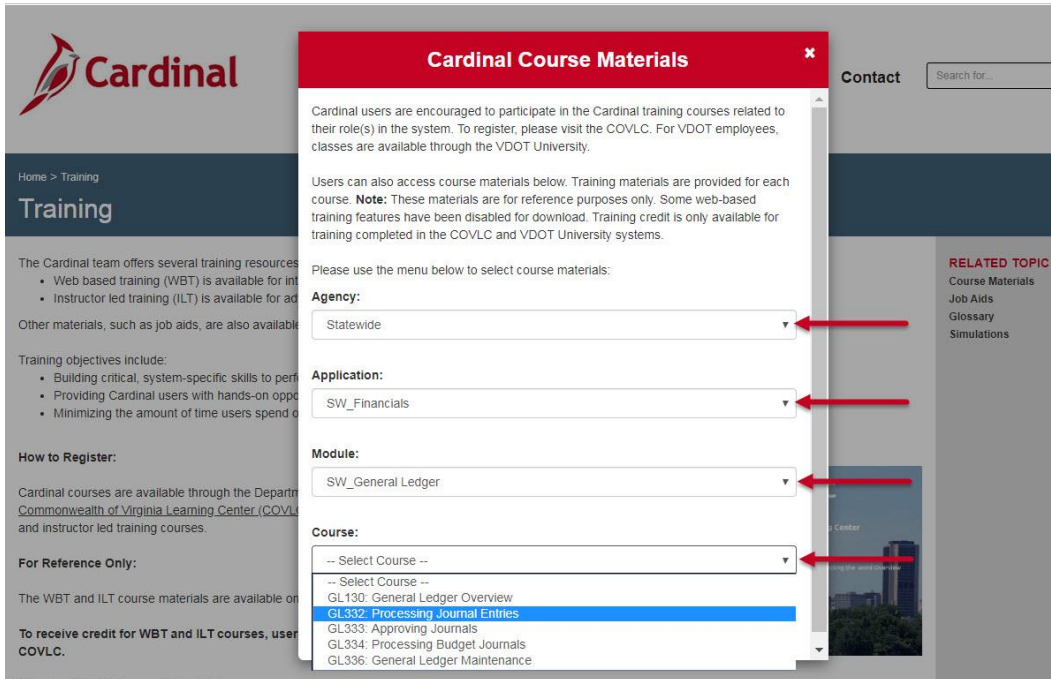
Updated Course: GL332: Processing Journal Entries (Pages 29-34; 104-109)

Course Materials & Job Aids

Course materials and job aids have been updated on the Cardinal website to reflect these changes and are available for download. You can use the links above to access each resource or you can navigate to course materials and job aids by following the steps below:

On the Cardinal website (www.cardinalproject.virginia.gov) navigate to:

- Training
    - Select Course Materials
    - Select Agency: Statewide
    - Select Application: SW_Financials
    - Select Module
    - Select Course
    - Click Submit

On the Cardinal website (www.cardinalproject.virginia.gov) navigate to:

- Training
    - Select Job Aids
    - Select Agency: Statewide
    - Select Application: SW_Financials
    - Select Module
    - Select Job Aids
    - Click Submit

Updates have been made to additional course materials and job aids to reflect other minor changes you may notice in the upgraded application. For a listing of the documents that have changed, click here.

As a reminder, the Cardinal application will be unavailable to users until approximately **10:00 a.m. on Tuesday, December 10, 2019.** You will receive a notification when Cardinal is back online.

If you encounter a Cardinal issue that cannot be resolved using the provided resources, please email the VITA Customer Care Center (VCCC) at vccc@vita.virginia.gov and reference "Cardinal Upgrade – Statewide" in the subject line. The VCCC is used to handle tracking and routing for all Cardinal help desk tickets.

Regards,

The Cardinal Team